

**2020 PERSONAL INCOME TAX
BRIEF CLIENT QUESTIONS**



Client Name(s):			
Phone number:		Additional phone: <i>(optional)</i>	

Change of address in 2020: No Yes

If Yes, provide new address:

Did you sell your house: In 2020? No Yes

In 2021? No Yes

If Yes: Address of property sold: _____

Selling price: _____

Year property purchased: _____

Did you work any days at home in 2020 due to Covid-19? No Yes

If Yes, how many days:

Any change to marital status in 2020: No Yes

If Yes: Date of change: _____

Partner's Name: _____

Partner's SIN: _____

Any new children in 2020? No Yes

If Yes, please provide:

How would you prefer to receive your Personal Tax Return: Electronically Paper

If electronically, provide email address: _____

You will receive an email from our CCH iFirm portal provider Wolters Kluwer with instructions to secure your portal

Emails for DocuSign Graham Scott Enns LLP uses DocuSign, accepted by the Canada Revenue Agency, to facilitate the process of obtaining e-signatures on certain documents. It can be used on any device. If you would like to use DocuSign, please provide an email address for each individual whose return we are completing:

For Office Use Only:	TPS updated: Date: _____	Initials: _____
	Portal invite sent: Date: _____	Initials: _____